Risk Researcher Supplementary Course

What is this course about?

This course is aimed at providing users knowledge on XPLAN's insurance module to enable you to research products and provide recommendations to your clients.

Who should attend this course?

- Financial Planners
- Paraplanners

Pre-Requisite

- Completion of an XPLAN New User course.
- Good knowledge of Financial Planning concepts

Time

Half Day

Learning Outcome

After completing this course, participants will be able to:

- Enter client details into Client Focus via a Wizard
- Use the Needs Analysis calculator to calculate the level of insurance your client needs
- Use Risk Researcher to provide insurance advice
- Use the various Research Tools available to recommend an appropriate product
- Implement your recommended Product
- Merge a Limited Statement of Advice (SOA) using a wizard with insurance recommendations

How do I register for this course?

Contact your Account Executive or view the XPLAN Training Listing on our website.

IRESS Limited
Level 11
57 Fort St
Auckland 1010
New Zealand

T (09) 300 5570
enquiries@iress.co.nz
www.iress.co.nz

Offices in:
Australia, Canada, Hong Kong, New Zealand, Singapore, South Africa, United Kingdom